

**UNITED STATES BANKRUPTCY COURT
SOUTHERN DISTRICT OF TEXAS
HOUSTON DIVISION**

In re:

COMPUTE NORTH HOLDINGS, INC., *et al.*,¹

Debtors.

)
) Chapter 11
)
) Case No. 22-90273 (MI)
)
) (Jointly Administered)
)

NOTICE OF FILING OF PLAN SUPPLEMENT

PLEASE TAKE NOTICE THAT on December 21, 2022, the United States Bankruptcy Court for the Southern District of Texas (the “Court”) entered an order [Docket No. 715] (the “Disclosure Statement Order”): (a) authorizing the above-captioned debtors and debtors in possession (collectively, the “Debtors”), to solicit votes on *Second Amended Joint Liquidating Chapter 11 Plan of Compute North Holdings, Inc. and Its Debtor Affiliates* (as may be amended, supplemented, or modified from time to time, the “Plan”);² (b) conditionally approving the *Disclosure Statement for the Second Amended Joint Liquidating Chapter 11 Plan of Compute North Holdings, Inc. and Its Debtor Affiliates* (the “Disclosure Statement”) as containing “adequate information” pursuant to section 1125 of the Bankruptcy Code; (c) approving the solicitation materials and documents to be included in the solicitation packages (the “Solicitation Packages”); and (d) approving procedures for soliciting, receiving, and tabulating votes on the Plan and for filing objections to confirmation of the Plan and final approval of the Disclosure Statement.

PLEASE TAKE FURTHER NOTICE THAT as contemplated by the Plan and the Disclosure Statement Order, the Debtors filed the Plan Supplement with the Bankruptcy Court on January 18, 2023 [Docket No. 835]. The Plan Supplement includes the following materials in connection with confirmation (each as defined in the Plan):

Exhibit A – the Assumed Executory Contracts and Unexpired Leases Schedule;

Exhibit B – Amended Schedule of Retained Causes of Action;

Exhibit C – Wind-Down Transaction Memorandum;

¹ The Debtors in these chapter 11 cases, along with the last four digits of each Debtor’s federal tax identification number, include: Compute North Holdings, Inc. (4534); Compute North LLC (7185); CN Corpus Christi LLC (5551); CN Atoka LLC (4384); CN Big Spring LLC (4397); CN Colorado Bend LLC (4610); CN Developments LLC (2570); CN Equipment LLC (6885); CN King Mountain LLC (7190); CN Minden LLC (3722); CN Mining LLC (5223); CN Pledgor LLC (9871); Compute North Member LLC (8639); Compute North NC08 LLC (8069); Compute North NY09 LLC (5453); Compute North SD, LLC (1501); Compute North Texas LLC (1883); Compute North TX06 LLC (5921); and Compute North TX10 LLC (4238). The Debtors’ service address for the purposes of these chapter 11 cases is 7575 Corporate Way, Eden Prairie, Minnesota 55344.

² Capitalized terms not otherwise defined herein shall have the same meaning as set forth in the Plan.

Exhibit D – Wind-Down Budget;

Exhibit E – Plan Administrator Agreement; and

Exhibit F – Litigation Trust Agreement.

The Debtors shall have the right to alter, amend, modify, or supplement the documents contained in the Plan Supplement up to the Effective Date as set forth in the Plan.

PLEASE TAKE FURTHER NOTICE THAT the Debtors anticipate that the Debtors’ corporate names will be changed prior to the Combined Hearing (as defined below). The changes to each of the Debtors’ respective corporate names are as follows:

	Current Name	Proposed New Name
1.	Compute North Holdings, Inc.	Mining Project Wind Down Holdings Inc.
2.	Compute North LLC	Mining Project Wind Down LLC
3.	CN Pledgor LLC	Mining Project Wind Down Pledgor LLC
4.	Compute North Member LLC	Mining Project Wind Down Member LLC
5.	CN Corpus Christi LLC	Mining Project Wind Down Corpus Christi LLC
6.	CN Atoka LLC	Mining Project Wind Down Atoka LLC
7.	CN Big Spring LLC	Mining Project Wind Down BS LLC
8.	CN Colorado Bend LLC	Mining Project Wind Down Colorado Bend LLC
9.	CN Developments LLC	Mining Project Wind Down Developments LLC
10.	CN Equipment LLC	Mining Project Wind Down Equipment LLC
11.	CN King Mountain LLC	Mining Project Wind Down King Mountain LLC
12.	CN Minden LLC	Mining Project Wind Down MDN LLC
13.	CN Mining LLC	Mining Project Wind Down Mining LLC
14.	Compute North NC08 LLC	Mining Project Wind Down NC08 LLC
15.	Compute North NY09 LLC	Mining Project Wind Down NY09 LLC
16.	Compute North SD, LLC	Mining Project Wind Down STHDAK LLC
17.	Compute North Texas LLC	Mining Project Wind Down Texas LLC
18.	Compute North TX06 LLC	Mining Project Wind Down TX06 LLC
19.	Compute North TX10 LLC	Mining Project Wind Down TX10 LLC

PLEASE TAKE FURTHER NOTICE THAT the hearing at which the Court will consider Confirmation of the Plan and final approval of the Disclosure Statement (the “Combined Hearing”) will commence on **February 16, 2023, at 1:30 p.m.** prevailing Central Time, before the Honorable Marvin Isgur, in the United States Bankruptcy Court for the Southern District of Texas, located at Courtroom 404, 4th floor, 515 Rusk Avenue, Houston, TX 77002.

PLEASE TAKE FURTHER NOTICE THAT the deadline for filing objections to the Plan or final approval of the Disclosure Statement is **February 1, 2023, at 4:00 p.m.** prevailing Central Time (the “Plan and Disclosure Statement Objection Deadline”). Any objection to the Plan **must:** (a) be in writing; (b) conform to the Bankruptcy Rules, the Bankruptcy Local Rules and any orders of the Court; (c) state, with particularity, (i) the name of the objector, (ii) the nature and

amount of the Claims held or asserted by the objector against the Debtors' estates or properties, (iii) the basis and nature of any objection, and the specific grounds therefor, to the Plan and, if practicable, (iv) a proposed modification to the Plan that would resolve such objection; and (d) be filed with the Court and served on the Debtors and certain other parties so as to be **actually received** on or before the Plan and Disclosure Statement Objection Deadline.

PLEASE TAKE FURTHER NOTICE THAT if you would like to obtain a copy of the Plan, the Disclosure Statement, the Plan Supplement, or related documents, you should contact Epiq Corporate Restructuring, LLC, the claims, notice, and solicitation agent retained by the Debtors in these chapter 11 cases (the "Solicitation Agent"), by: (a) visiting the Debtors' restructuring website at: <https://dm.epiq11.com/computenorthholdings>; (b) writing to Compute North Holdings, Inc., c/o Epiq Ballot Processing, 10300 SW Allen Blvd., Beaverton, OR 97005; and/or (c) emailing ComputeNorthHoldingsInfo@epiqglobal.com. You may also obtain copies of any pleadings filed in these chapter 11 cases for a fee via PACER at: <http://www.tx.uscourts.gov>.

Article IX of the Plan contains Release, Exculpation, and Injunction Provisions, and Article IX.4 contains a Third-Party Release.

Thus, you are advised to review and consider the Plan carefully because your rights might be affected thereunder.

This Notice is being sent to you for informational purposes only. If you have questions with respect to your rights under the Plan or about anything stated herein or if you would like to obtain additional information, contact the Solicitation Agent.

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Dated: January 18, 2022
Houston, Texas

/s/ James T. Grogan III

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